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Warning signs for European air connectivity amid policy shortcomings, market shifts and geopolitics

Lower air connectivity hampers wider European competitiveness, cohesion and global positioning — pointing to new aviation reality

Athens, 18 June 2025: ACI EUROPE has today published its **2025 Airport Industry Connectivity Report**: the definitive barometer of air connectivity in Europe. Released ahead of the 35th ACI EUROPE Annual Congress & General Assembly, the report is based on the connectivity indexes developed by SEO Amsterdam Economics — the most comprehensive and complete tool for measuring and ranking airport connectivity.

The 2025 report reveals that despite increasing by **+7%** in 2025 over the preceding year, air connectivity (direct + indirect air connectivity) in Europe still remains **-9%** below pre-pandemic (2019) levels. This stands in stark contrast with passenger volumes which achieved full recovery in 2024 and have kept increasing throughout 2025 — thus pointing to consumers and communities seeing fewer and more costly options[1].

The report also makes plain to see how unsupportive policies, structural market changes and geopolitics are resulting in altered connectivity patterns as well as significant performance variations amongst both national and individual airport markets.

Olivier Jankovec, Director General of ACI EUROPE said: "*The data we present today is unequivocal: Europe urgently needs a strategic policy reset that places air connectivity as a key pillar of its competitiveness, cohesion and strategic autonomy agendas. This means recognising that air connectivity — and with it aviation — is not just about soft power. It delivers critical economic and social benefits, secures Europe's global positioning and even contributes to projecting hard power capabilities. Yet, unaligned and disjointed aviation policies — including punitive taxation — combined with geopolitical tensions and structural market shifts, are putting these benefits at risk.*"

He added: "*With every 10% increase in direct air connectivity linked to a 0.5% rise in GDP per capita, it is European citizens who ultimately pay the price. Our policy makers must future proof the air connectivity that is inherent to our European way of life and global outreach.*"

NON-EU+ MARKET HARDEST HIT BY GEOPOLITICS, NATIONAL MARKET GAPS PERSIST ACROSS THE BOARD

The **EU+ market**[2] (-8% vs. 2019) has recovered more air connectivity than the **rest of Europe**, with non-EU+ market[3] underperforming European average at -12%.

This mainly results from Ukrainian airports having lost all air connectivity whilst those in Russia (-43%) and Belarus (-70%) reporting dramatic drops. Israel (-21%) has also suffered major losses due to the ongoing conflict in Gaza.

Besides geopolitics, aviation policies and structural changes in the aviation market — in particular the prominence of leisure & Visiting Friends & Relatives (VFR) demand and the expansion of Ultra Low-Cost Carriers (LCCs) — are also shaping the performance of national markets:

- Within the EU+ market, three countries in particular lead the charge in air connectivity expansion: Greece (+35%), Portugal (+10%), Cyprus (+8%).

  At the other end of the spectrum, 13 countries reported double-digit connectivity losses, with the most acute decreases in Sweden (-33%), Finland (-30%), Czech Republic (-22%), Austria and Germany (both at -21%) — largely reflecting the impact of geopolitics and national aviation taxes.

  Amongst the largest EU+ markets, only tourism-reliant Spain exceeded its 2019 results by +3%. The UK (-7%), France (-14%) and Germany remained far behind — with France's performance likely to be further impacted by the significant increase in its aviation taxes effective this year.

- In the non-EU+ market, the best performances in air connectivity are reported by Uzbekistan (+73%), Albania (+56%), Bosnia & Herzegovina (+40%), Armenia and Türkiye (both at +36%).

ISTANBUL, AMSTERDAM-SCHIPHOL AND LONDON-HEATHROW TOP DIRECT CONNECTIVITY RANKING

Istanbul (+13% since 2019) **remains on top of the European ranking for direct connectivity**, having moved up from the 5th position pre-pandemic (2019). The Turkish hub enjoys the best direct connectivity to the Middle East and second best to Asia-Pacific, while also being well placed for direct connectivity to Africa and Europe.

Amsterdam-Schiphol (-4%) **comes second**, largely thanks to its excellent connectivity within Europe. This reflects the small size of its national market and the need to ensure critical mass for feeding its long-haul network. The planned reduction in the capacity of the Dutch hub makes it unlikely that it will maintain its position in the coming years.

London-Heathrow (-2%) **took the third position**. In addition to unmatched direct connectivity to North America (which is nearly twice that of its next competitor — Paris-CDG), the British hub is also the airport in Western Europe with the highest direct connectivity to the Middle East.

Frankfurt (-11% vs. 2019) has replaced **Paris-CDG** (-7% vs. 2019) in the fourth position this year, partly thanks to a significant increase in its direct connectivity to Asia-Pacific (+17% vs. 2024). The French hub, in fifth position overall, is noteworthy for its diverse network, holding the second position for direct connectivity to Africa, Latin America and Caribbean, and North America.

Along with Istanbul, the following airports have recovered and/or exceeded their pre-pandemic (2019) direct connectivity levels: **Antalya** (+29%), **Athens** (+24%), **Istanbul-Sabiha Gökçen** (+14%), **Palma de Mallorca** (+11%), **Dublin** (+8%), **Lisbon** (+4%), **Rome-Fiumicino** (+3%) and **Barcelona** (+1%).

This once again reflects the prominence of leisure & VFR demand along with LCCs' expansion. While the direct connectivity offered by **LCCs** from European airports has increased by **+19%** since 2019, the direct connectivity offered by **Full-Service Carriers** (FSCs) has shrunk by **-15%**.

ISTANBUL NOW TOPS GLOBAL HUB RANKING

Istanbul has replaced Frankfurt as the top airport globally for hub connectivity this year. Istanbul's hub connectivity has increased by an impressive **+59%** since 2019 — a reflection of the impressive expansion of its hub-based carrier Turkish Airlines, its geographical strength at the crossroads of Europe, Africa and Asia — combined with ample available capacity and Türkiye's generally supportive aviation policy.

The Turkish hub is followed by **Dallas Fort Worth** (-5%) and **Frankfurt**, which has seen its hub connectivity shrinking by **-21%** since 2019.

Overall, hub connectivity across Europe remains **-12%** below its pre-pandemic (2019) level, and thus keeps significantly underperforming against direct connectivity (**-5%**). Although the gap has narrowed somewhat over the past 4 years, this has become a consistent pattern which reflects structural changes in the aviation market — in particular the relative retrenchment of FSCs and expansion of Ultra-LCCs, with the development of more international direct air services bypassing larger hubs altogether.

8 European airports are amongst the top 20 global airports for hub connectivity — along with 8 from North America and 4 from Asia-Pacific and the Middle East. Apart from Istanbul, the largest gains in hub connectivity when compared to pre-pandemic (2019) levels come from Tokyo Haneda (+51%) and Doha (+43%).

Conversely, the hub connectivity of all major Western European hubs remains below 2019 levels — a symptom not just of their home-based carriers' retrenchment but also of unsupportive aviation policies, competitiveness challenges and weaker macroeconomic conditions.

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[1] Air fares for intra-European travel in June 2025 (3 months advanced purchase) were up by +33% compared to 2019 (source: RDC)
[2] EU, EEA, Switzerland and the UK
[3] Albania, Armenia, Azerbaijan, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, Kyrgyzstan, North Macedonia, Moldova, Montenegro, Russia, Serbia, Tajikistan, Türkiye, Turkmenistan, Ukraine and Uzbekistan

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Note to editors

Access the 2025 ACI EUROPE Airport Industry Connectivity Report here.

TYPES OF CONNECTIVITY

Direct connectivity: These are the direct air services available from the airport — measured not just in terms of destinations, but also factoring in the frequency of flights to the same destination (so for example, an airport with 5 daily flights to another airport, will register a higher score than one with only 4).

Indirect connectivity: This measures the number of places people can fly to, through a connecting flight at hub airports from a particular airport. For example, if you fly from Cork to a hub airport such as Amsterdam Schiphol, that's a direct flight from to A to B. But with the vast choice of onward destinations you can fly to from there — the large number of available onward connections from these airports expands the range of destinations available from the airport of origin. Indirect connections are weighted according to their quality, based on connecting time and detour involved with the indirect routing. For example, a flight from Manchester to Johannesburg via Paris-Charles de Gaulle will register a higher score than an alternative routing via Doha.

Air connectivity: As the name suggests, this is the most comprehensive metric for connectivity — taking into account both direct and indirect connectivity from the airport in question. Air connectivity is defined as the sum of direct and indirect connectivity — thus measuring the overall level to which an airport is connected to the rest of the World, either by direct flights or indirect connections via other airports.

Hub connectivity: Hub connectivity measures the number of connecting flights that can be facilitated by the hub airport in question — taking into account a minimum and maximum connecting time, and weighing the quality of the connections by the detour involved and connecting times.

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ACI EUROPE is the European region of Airports Council International (ACI), the only worldwide professional association of airport operators. ACI EUROPE represents over 600 airports in 55 countries. Our members facilitate over 95% of commercial air traffic in Europe. Airports and air connectivity support 14 million jobs, generating €851 billion in European economic activity (5% of GDP). In response to the Climate Emergency, in June 2019 our members committed to achieving Net Zero carbon emissions for operations under their control by 2050, without offsetting.